



prosperity connection®

# EXTERNAL COMMITTEE UPDATES

MARCH 2026



# FROM THE CAO

As we begin this year's work together, I want to start by thanking each of you for being part of Prosperity Connection's External Committee. Your perspective and expertise play an important role in helping us think strategically about how we grow our reach, strengthen our visibility, and expand the resources that make our work possible.

Headed into Q2, there's a lot of exciting momentum across the organization. Earlier this year, our leadership team made the decision to extend our strategic plan. By adopting an 18-month framework, we're able to maintain momentum on our priorities without diverting time and energy into a full strategic planning process during a year when fundraising growth is a major focus. Alongside this, we've updated our internal work plan and are beginning to operate from the new KPIs Greg finalized, helping us stay focused on measurable progress. Much of **my** work centers around the *Celebrate* pillar—elevating our story, visibility, and supporters—while also contributing to the *Grow* pillar as we expand the reach of our services and strengthen funding opportunities.

You may remember that I had initially planned to send a short one-page executive summary between our meetings each month. That cadence didn't quite materialize in January and February due to time and capacity constraints as we moved through several early-year priorities. My goal is to implement that rhythm moving forward so you continue to have clear insight into our progress and where your ideas and expertise can make the greatest impact.

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MARCH  
2026

# GROWTH HIGHLIGHTS

	TOTAL COACHING SESSIONS	UNIQUE COACHING CLIENTS	CREDIT REPORT REVIEWS	CREDIT WELLNESS EVENTS	UNIQUE CLASS ATTENDEES	CLASS PULL-THROUGH RATE
MARCH	164	112	29	0	102	35%
JULY						
NOVEMBER						

The PC team is working to finalize our goals by the end of March, at which point I will update my reporting to reflect our progress towards those goals and our organizational KPI's.



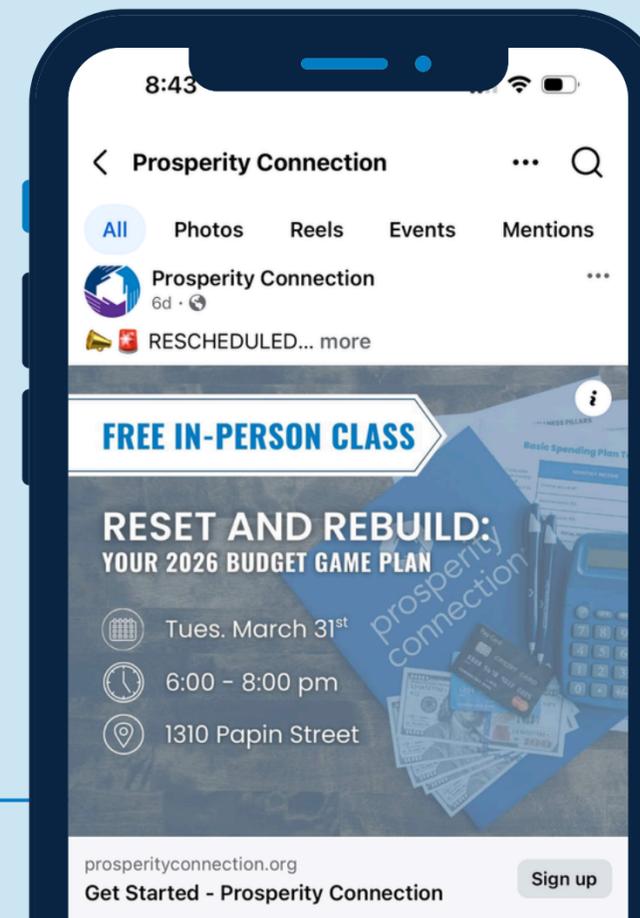
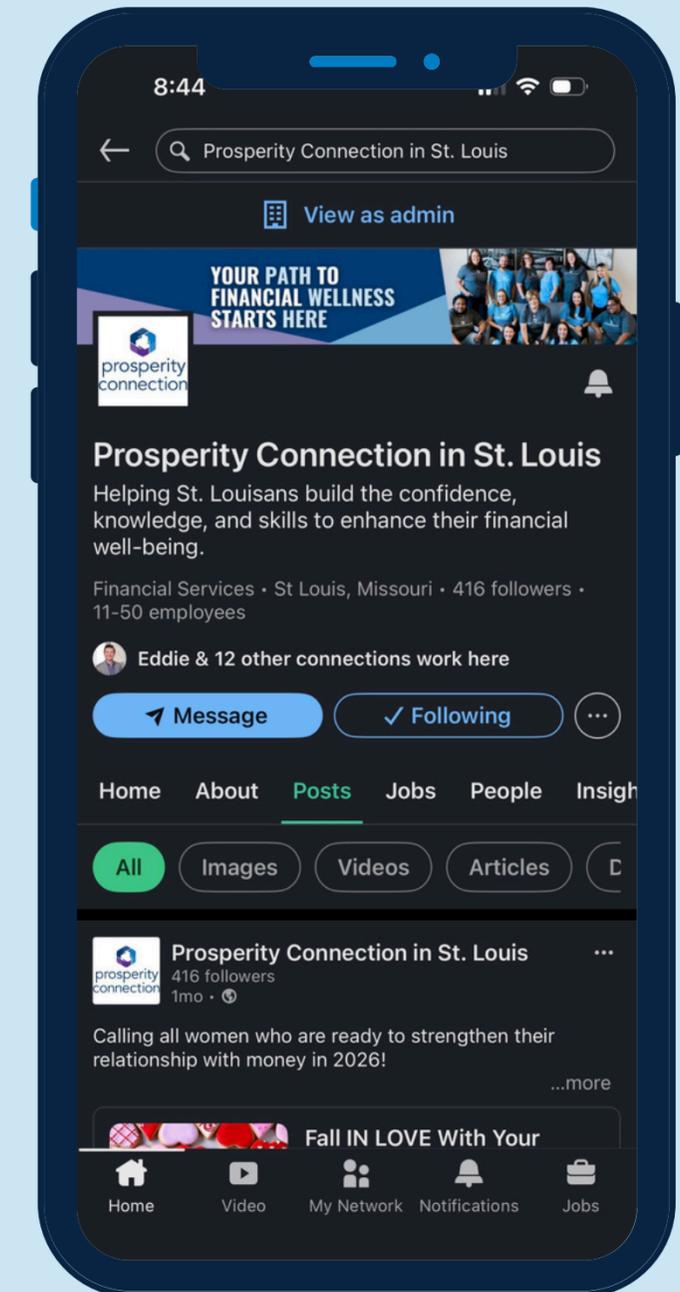
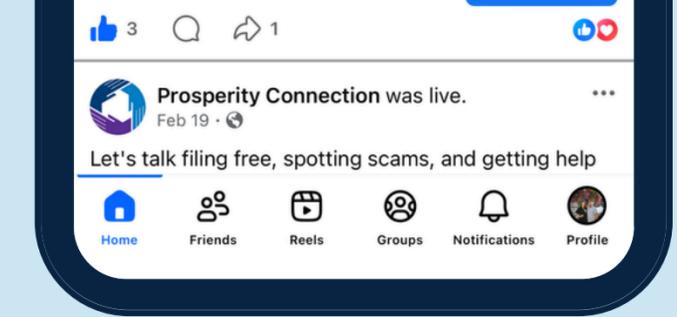
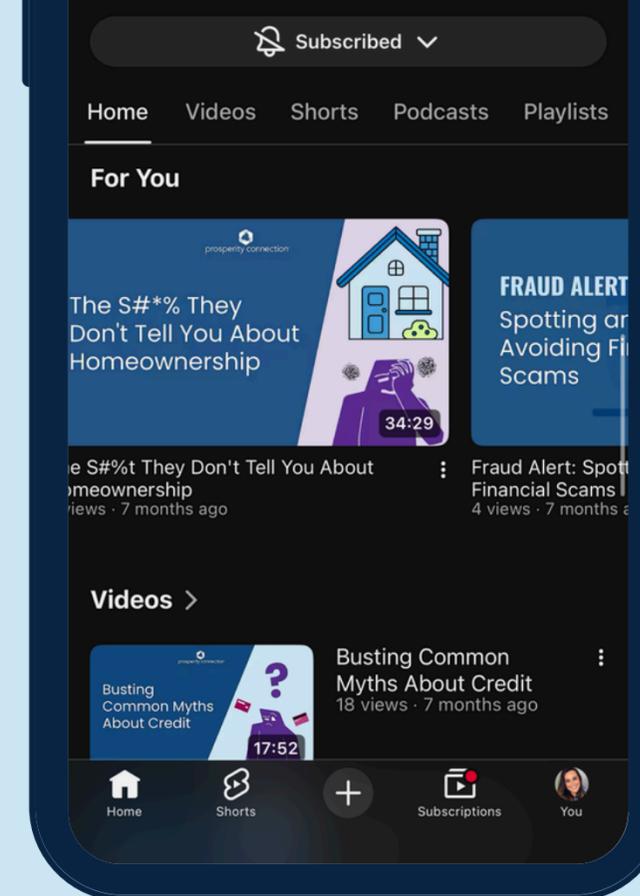
# SOCIAL MEDIA UPDATES

Facebook and social media overall have taken a more limited role since our last meeting. This shift reflects intentional decisions around staffing, budget, and prioritization, as we focus our capacity on the strategies most directly tied to client engagement and revenue growth.

While social media remains an important visibility tool, it is not currently a primary driver of class registrations or donations. As a result, we are maintaining a baseline presence, rather than investing heavily in expansion. That said, we are still working toward a few targeted goals: strengthen LinkedIn for ESFE, increase traffic to existing YouTube content, and maintain overall platform relevance.

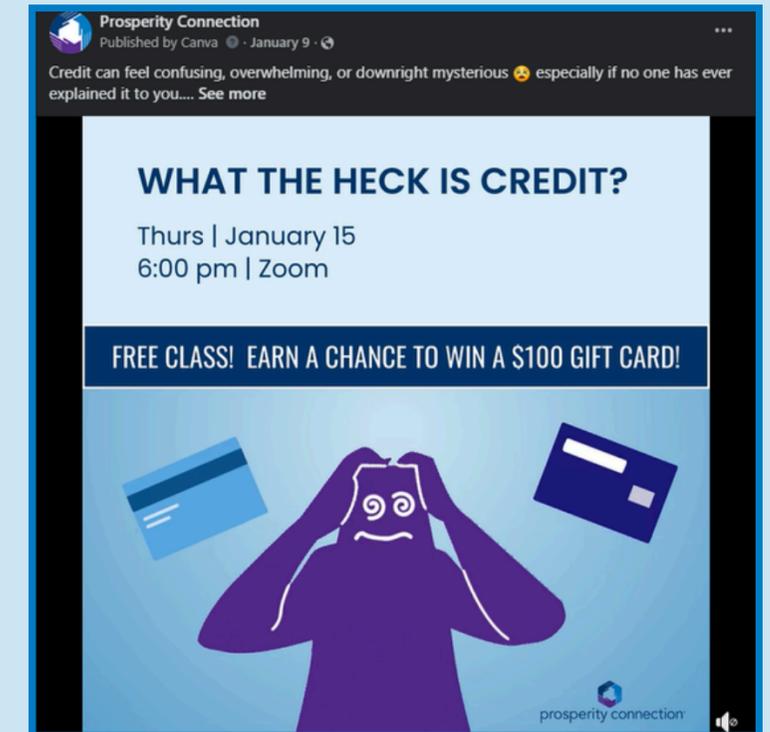
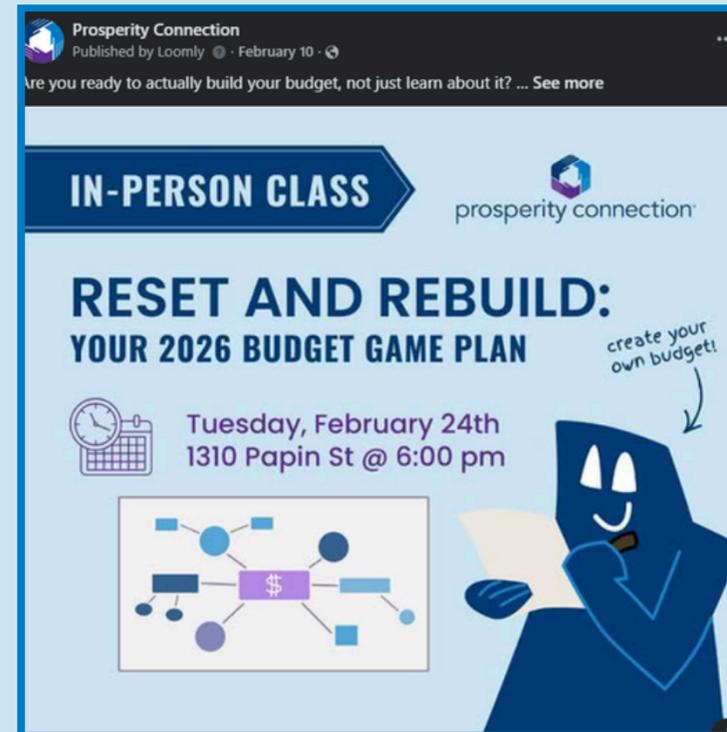
*The following metrics reflect activity from December 1 through March 12.*

MARCH  
2026



# FACEBOOK METRICS

VIEWERS	34,788; increase of 77.2%
NET FOLLOWER GROWTH	9; decrease of 76%
CONTENT INTERACTIONS	341; decrease of 28.7%
LINK CLICKS	652; increase of 166%

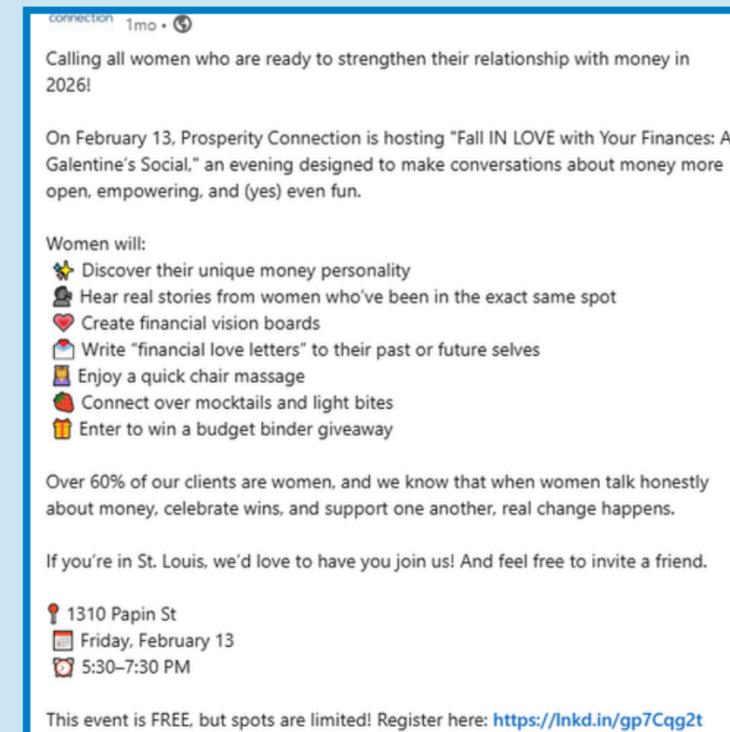
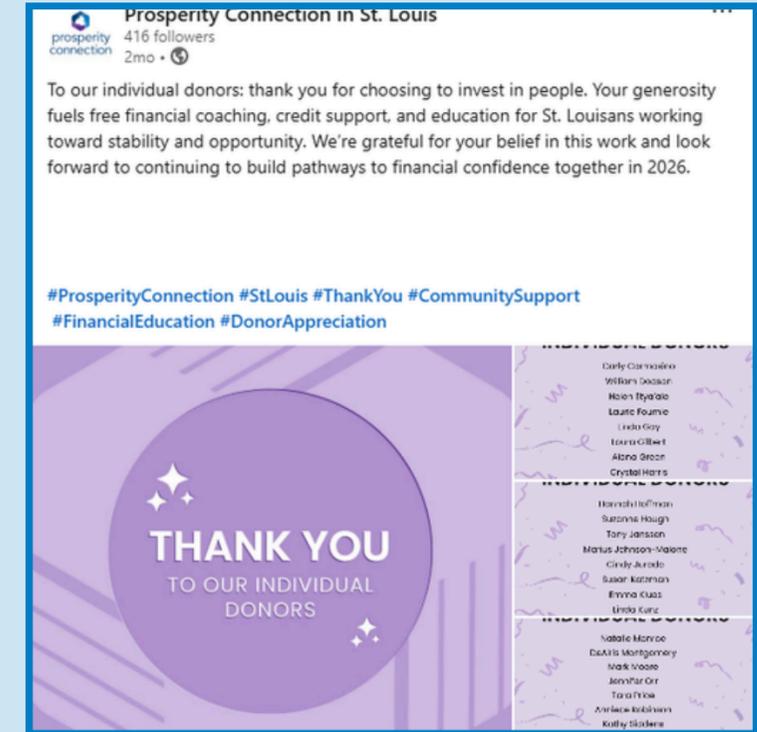
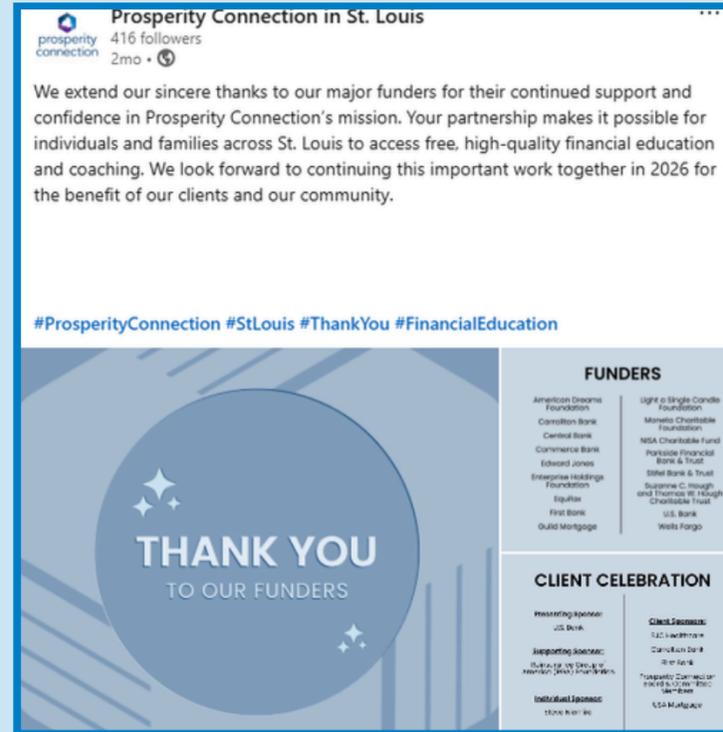


MARCH 2026

# LINKEDIN METRICS

NEW FOLLOWERS	14
UNIQUE MEMBERS REACHED	495
ENGAGEMENT RATE	16.7%
CLICKS	133
SEARCH APPEARANCES	81

MARCH 2026



# EMAIL NEWSLETTER UPDATES

Our intention heading into 2026 was to shift client newsletters to a quarterly cadence, and we plan to maintain that approach to align with our quarterly class offerings and prioritize capacity. We have also transitioned to the Feathr platform to streamline systems, consolidate costs, and gain stronger insight into performance and ROI.

As we move forward, Feathr will allow us to more clearly track whether newsletters are driving class registrations and adjust our strategy accordingly. While the client newsletter cadence is set, the partner/funder newsletter remains a priority, though its long-term cadence is still being evaluated.

	OPEN RATE	CLICK RATE
JANUARY	10%	6.5%
APRIL		
JULY		
OCTOBER		

# RECENT GRANTS, EARNED INCOME, AND DONATIONS

- Individual donations; Giving Tuesday; **\$640**
- Earned income; MCA; **\$2,500**
- Individual donation; camille branch/edj; **\$600**
- Grant; Stifel Bank & Trust; **\$2,500**
- Grant; Bank of Springfield; **\$1,500**
- Grant; Light a Single Candle; **\$125,000**
- Grant; St. Louis Community Foundation; **\$50,000**
- Individual donation; Tony Janssen; **\$200**
- Grant; American Family Dreams Foundation; **\$10,000**
- Individual donation; Virginia Williams; **\$500**
- Individual donation; Mike & Kim Sullivan; **\$100**
- Grant; Carrollton/The Houghs; **\$70,000**
- Individual donation; Rick Spiekermann; **\$1,000**
- Earned income; SBEC; **\$5,000**
- Earned income; Mission: St. Louis; **\$1,600**
- Individual donation; Frankie Eichenberger; **\$1,000**
- Individual donation; Bill Siedhoff; **\$10,000**
- Client Celebration sponsorships; **\$24,000**

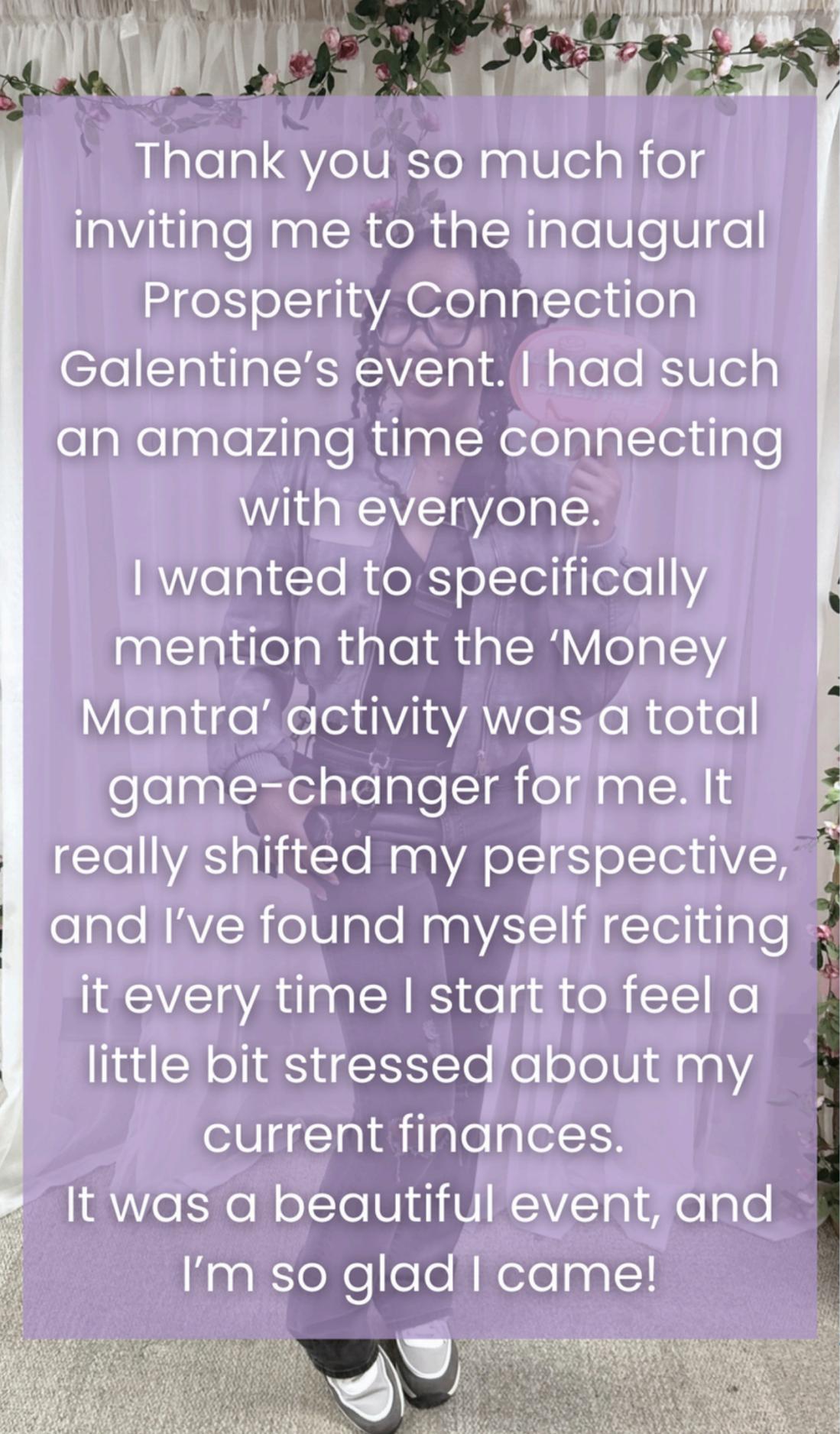
# PIPELINE

OPPORTUNITY TYPE	COMPANY/ORG	AMOUNT	STAGE	DUE DATE	ASSISTANCE
EARNED INCOME	ACCESS POINT	\$30,000	SOW SENT	N/A	GREEN
GRANT	UPWARD MOMENTUM	\$200,000	APP IN DEVELOPMENT	3/31	ORANGE
GRANT	FINRA	\$50,000	APP IN DEVELOPMENT	4/16	YELLOW
GRANT	JAMES S MCDONNELL FOUNDATION	TBD	APP IN DEVELOPMENT	EARLY MAY	GREEN
GRANT	MONETA	\$25,000	SUBMITTED		GREEN
GRANT	O'REILLY AUTOMOTIVE FOUNDATION	\$15,000	APP IN DEVELOPMENT	4/15	ORANGE
GRANT	ROBERT WOOD JOHNSON FOUNDATION	\$50,000	SUBMITTED		ORANGE
GRANT	U.S. BANK	\$50,000	SUBMITTED		GREEN

MARCH  
2026

# GENERAL UPDATES

- Client Celebration planning is well underway—videos filmed, record sponsorship secured, invitations sent, and new enhancements in progress.
- Feathr platform launched to streamline marketing and fundraising; early campaigns underway with Day of Giving as the first major rollout.
- Inaugural Day of Giving set for April 17, designed to leverage Celebration momentum without shifting it into a traditional fundraiser.
- Awarded \$125K from LASC for Phase 1 of our investment project; Civic Insight will lead research, and internal team will develop program specifics.
- Developing “2.0” paid classes to support a more diversified and sustainable revenue model.
- Advancing collaborative partnership conversations in response to funder priorities around collective impact and shared strengths.
- FOCUS St. Louis Emerging Leaders team supporting a Civic Action Project focused on targeted outreach to men and boys of color.
- Client Portal nearing launch, with client testing phase up next.
- Hosted first peer mentorship event (Galentine’s Day), with strong attendance and feedback—positioning for future funding and expansion.



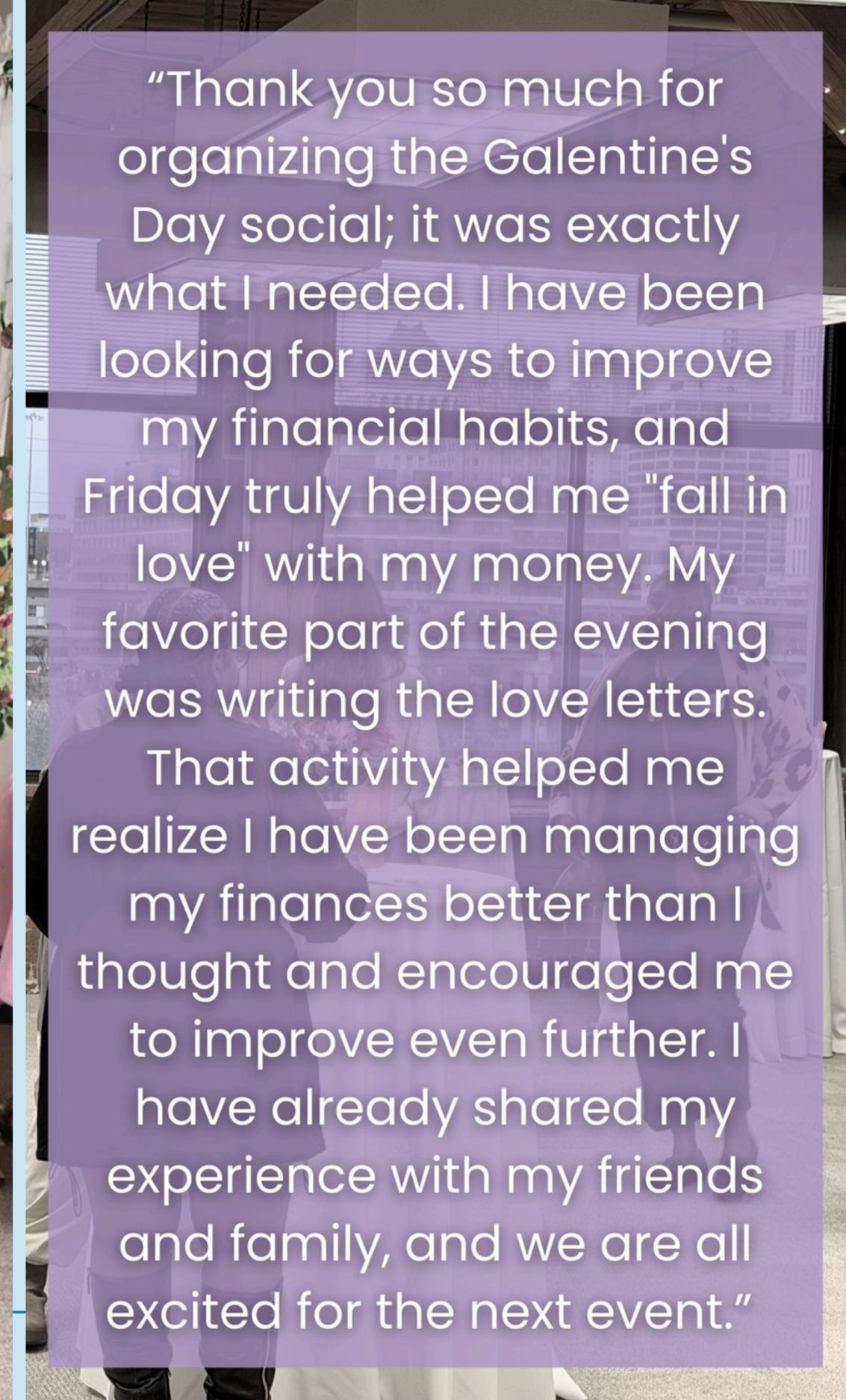
Thank you so much for inviting me to the inaugural Prosperity Connection Galentine's event. I had such an amazing time connecting with everyone.

I wanted to specifically mention that the 'Money Mantra' activity was a total game-changer for me. It really shifted my perspective, and I've found myself reciting it every time I start to feel a little bit stressed about my current finances.

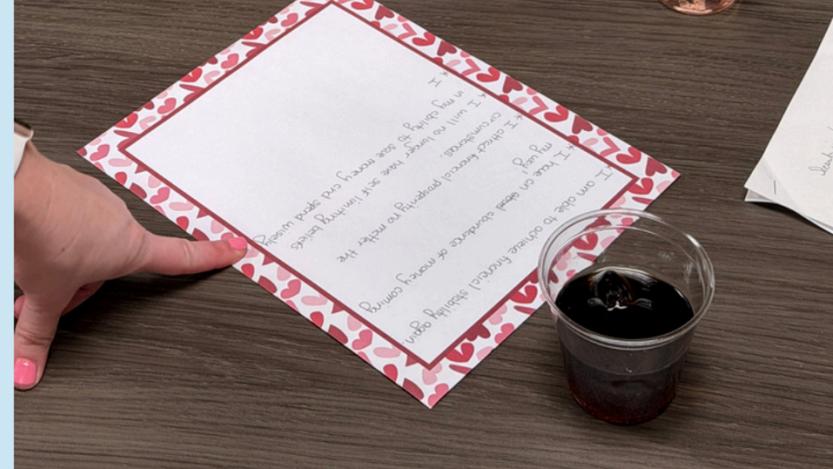
It was a beautiful event, and I'm so glad I came!



"Thank you so much for the invite to the Galentine's Day event. I truly enjoyed everything, from the decorations to the financial planning activities. The guest speakers were great, and I loved every moment of the evening."



"Thank you so much for organizing the Galentine's Day social; it was exactly what I needed. I have been looking for ways to improve my financial habits, and Friday truly helped me "fall in love" with my money. My favorite part of the evening was writing the love letters. That activity helped me realize I have been managing my finances better than I thought and encouraged me to improve even further. I have already shared my experience with my friends and family, and we are all excited for the next event."



# HELP NEEDED

- Client Celebration – do you know someone who should be in the room?
- Does anyone know a contract grant writer?
- Day of Giving support
- Funder/Partner introductions
  - mentorship program
  - senior citizens
  - auto buying
  - youth
  - justice-involved